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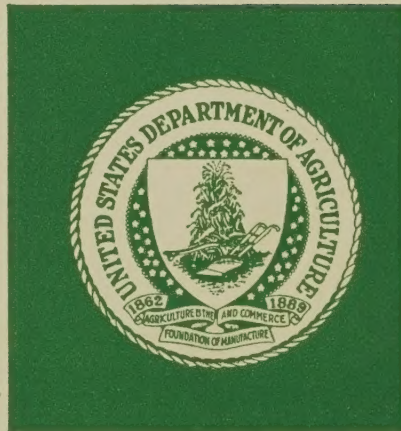
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Purpose

This survey is part of a project to develop an instrument for obtaining data about low income families' expenditure and income patterns over time. It is being done for the Family Economics Section of the School of Home Economics Section of the School of Home Economics, University of Missouri, Columbia, with the cooperation of the Family Economics Branch of the Consumer and Food Economics Research Division, Agricultural Research Service, U.S. Department of Agriculture, Washington, D.C.

In both this developmental survey and an expanded panel of households which may be established later, our desire is to develop methods and obtain data to answer questions such as:

- Which expenditure categories change, or show greater responsiveness, to changes in resource availability and/or household characteristics?
- Which changes in income (e.g., what sources of which earner's income) tend particularly to "trigger" expenditure adjustments?
- Are there connections between:
 1. Amount or nature of an income change and when (how quickly) expenditure adjustments are made and of what magnitude?
 2. Types of income (who earns; source) which change and particular categories of spending adjustment?
 3. Certain expenditure changes (initiating changes) and other spending adjustments (secondary or "echo" changes)?
- If food expenditures tend to be maintained during periods of income change, what else in the household spending pattern is cut back?
- Does the length of time which a given level of income has been experienced affect: (1) speed and/or (2) magnitude of expenditure adjustment when income changes?
- How does an adjustment in one expenditure category affect spending in other categories?

The immediate project, then, is to develop, test, and evaluate an instrument to elicit the desired data. Field work is being limited to a small number (approximately 35) of low income households in St. Louis. Interviews will be conducted monthly for six months.

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CATALOGING - PREP.

For reference purposes, the project leader is Gordon E. Bivens, Family Economics, 238 Stanley Hall, University of Missouri, Columbia (phone 314/449-9331, Ext. 217).

The Face Sheet

The Cluster Number, Directory Page, Census Tract, # and Zipcode as these appear on your assignment sheet should be recorded on the lines in the upper right-hand corner of the fact sheet, page 1.

You are to make an initial call, plus up to three call-backs if necessary in order to complete the interview. Call-backs must be made on different days at different times. Keep an accurate record of each attempt in the appropriate section in the upper left-hand portion of the fact sheet. After three call-backs, if the interview is not completed, circle the appropriate reason for non-interview in 4A, with explanation, if called for, in 4B.

Be sure the respondent's name and address are filled in accurately (5A,5B), and that your name, ID number are recorded in 8A and 8B.

The items in Q.6 and Q.7 are to be circled appropriately from your observation.

The length of the interview is to be recorded in Q.3. It will be helpful to you to make a note of the beginning time of the actual interview when you commence; when the interview is completed, enter the number of minutes spent in actual interviewing in Q.3. Since one of the objectives of this project is to develop an interview technique which will reduce the time necessary to obtain the kind of data we want, it is important to have a very accurate measure of the length of the interview.

The Interview Schedule

- Q. 9 We have come to believe that for the population we are sampling, an extended rapport-building question is not only unnecessary but may be a detriment. Therefore, we are including only the brief statement at the beginning of this question. (IF ABSOLUTELY NECESSARY, YOU MAY SUPPLEMENT THIS BY REFERRING TO THE OBJECTIVES OF THE STUDY. ALSO, STRESS THE CONFIDENTIAL MANNER IN WHICH THEIR INFORMATION WILL BE TREATED.)

The number of people who live in the household refers to the number living there now and who draw on the common food supply and other household items and whose income and spending is blended into the overall household earning and spending pattern. (OMIT ROOMERS AND BOARDERS WHO PAY ROOM AND/OR BOARD AND WHOSE EARNINGS ARE SEPARATE FROM THAT OF THE REST OF THE HOUSEHOLD.)

Q. 10 IF THE RESPONDENT KNOWS ONLY THE TAKE-HOME PAY, USE THE FOLLOWING TABLE AS A ROUGH GUIDE FOR DETERMINING WHETHER TO INCLUDE THE HOUSEHOLD:

No. People in Household	Include household if its total (all members) take-home pay for the last 12 months was less than:		
	For last 12 Months	Per Month	Per Week
1 (head est. more than 65 years)	\$1900	\$158	\$ 37
1 (head est. less than 65 years)	1666	139	32
2 (head est. more than 65 years)	2400	200	46
2 (head est. less than 65 years)	2184	182	42
3	2784	232	54
4	3548	297	69
5	4230	352	82
6	4640	387	90
7 or more	5758	480	112

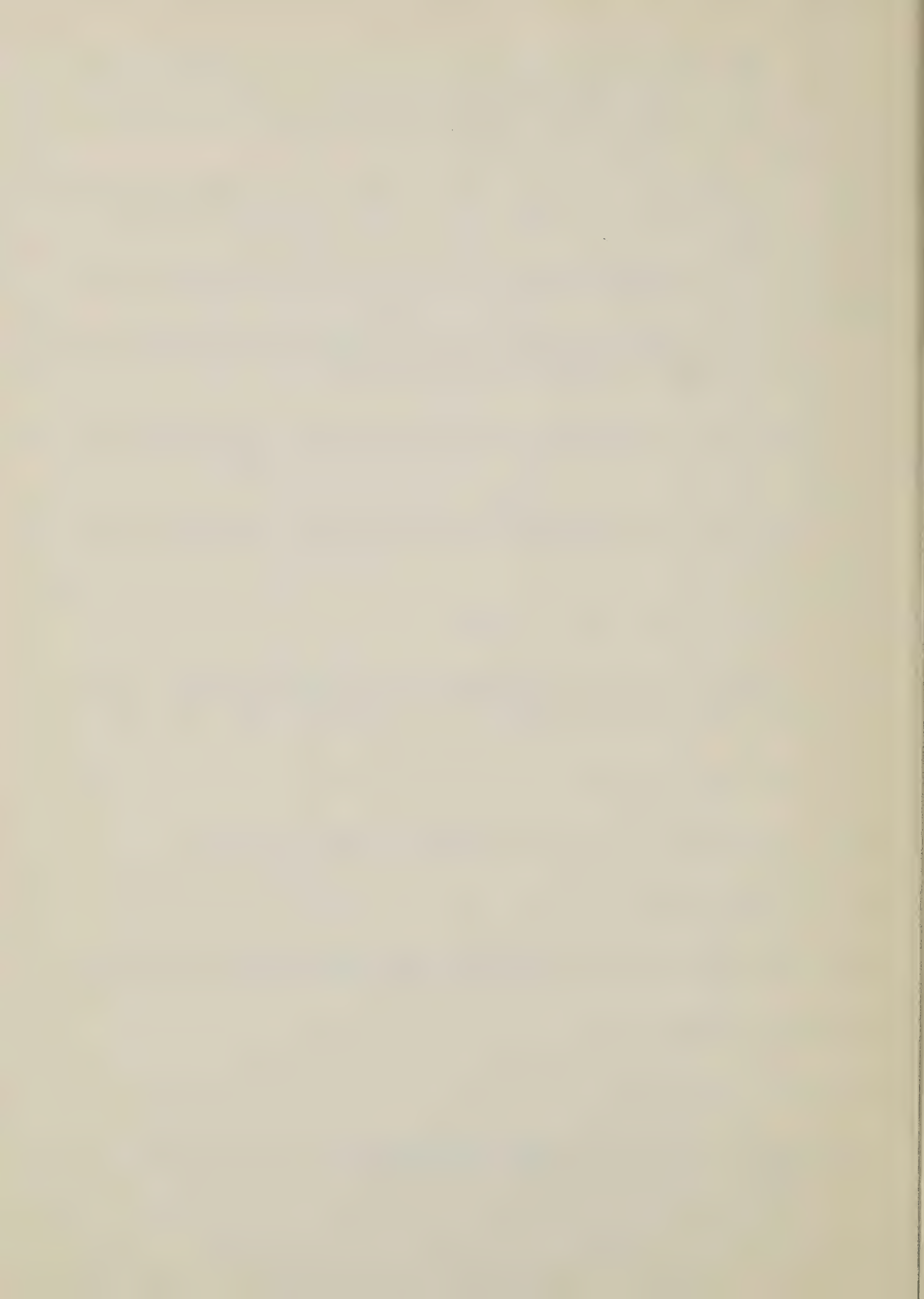
IF HOUSEHOLD IS INELIGIBLE ON BASIS OF LAST MONTH'S OR LAST WEEK'S INCOME, ATTEMPT TO DETERMINE WHETHER THAT INCOME IS REPRESENTATIVE OF MOST MONTHS (WEEKS). IF SO, TERMINATE THE INTERVIEW. IF IT IS NOT REPRESENTATIVE OF MOST MONTHS (WEEKS), ASK RESPONDENT TO ESTIMATE WHAT THEIR HOUSEHOLD INCOME HAS BEEN MOST OF THE LAST 12 MONTHS, AND DETERMINE ELIGIBILITY ON BASIS OF THAT INCOME LEVEL.

Q. 11 List all people who are living in the household.

Step 1 List the first name of all persons in the household, starting with the head (HEAD ACCORDING TO HOUSEHOLD'S PERCEPTION IF POSSIBLE, IF NOT POSSIBLE THAT WAY, DESIGNATE MAIN EARNER AS HEAD), spouse, children preferably listed from oldest to youngest, other persons. OMIT ROOMERS AND BOARDERS WHO PAY ROOM AND/OR BOARD OR IN OTHER WAYS MAKE COMPENSATION TO THE MAIN HOUSEHOLD. HOWEVER, YOU SHOULD LIST SUCH PERSONS ON THE BACK OF PAGE 3 AND DESCRIBE IF POSSIBLE--E.G., AGE, SEX, RELATIONSHIP TO HEAD, MARITAL STATUS, EDUCATION.

- Step 2 Record the relation of each person in the household to the head of the household in column 3.
- Step 3 Record the sex of each person in Column 4. Use M for male, F for female.
- Step 4 Record the age (at last birthday) of each person in Column 5.
- Step 5 Record the marital status of EACH PERSON OVER 16 in Column 6.
- Step 6 Record the number of years of school completed (not counting kindergarten) for EACH PERSON OVER 16 in Column 7.
- Step 7 YOU ARE TO INTERVIEW THE PERSON WHOM THE HOUSEHOLD DEEMS MOST KNOWLEDGEABLE ABOUT FAMILY SPENDING AND INCOME MATTERS. Put an X in Column 8 by the respondent.

- Q. 12 Record the part of the U.S. or a foreign country in which the HEAD grew up--that is, where HEAD spent most of the first 18 years of life.
- Q. 13 Record number of years HEAD has lived in Missouri. Do not record in more detail than the nearest one-fourth--e.g., 2, 2 1/4, 2 1/2, 2 3/4, 3 etc.
- Q. 14 Comments on Q. 13 applicable here.
- Q. 15 This question refers to the first 18 years of the head's life. If the respondent has trouble classifying the place, record the name of the place, and we can look it up.
- Q. 16 Self explanatory.
- Q. 17 Self explanatory. Be sure to list name of other organizations.
- Q. 18 Self explanatory.
- Q. 19 Record month and year if respondent knows both; otherwise record the year.
- Q. 20 Self explanatory
- Q. 21A Self explanatory
- Q. 21B Enter the amount paid on house mortgage and how frequently these payments are made--e.g., weekly, monthly, etc.



Q. 22A Self explanatory.

Q. 22B Record the amount the household paid for food stamps and the redemption value of their stamps when used in the store.

Q. 23 Respondent may use records in answering this question--for example, receipts, check book, etc. You enter the day of the week and the date for each of the seven days being probed. Mentioning these days and dates will be a memory prod for the respondent. IMPRESS ON R THAT THE WHOLE 24 HOURS OF EACH DAY IS TO BE REPORTED.

Record each purchase with as much detail (dollars and cents) as the respondent volunteers. However, don't press for more than nearest-dollar answers if it greatly delays the interview.

For households using food stamps (Q. 22), purchases of food for use at home should include both those made using food stamps and cash.

Circle the appropriate number to indicate whether each purchase was charged or paid for (PAID FOR INCLUDES PAYING WITH CASH OR CHECK).

Do not record here allowances given to children in the family.

For something bought on credit during this period, record as an expenditure only what they actually paid during this period and footnote with asterisk at bottom of page "* new debt". (BE SURE THAT THE BALANCE IS RECORDED IN Q. 30, Q. 31, Q. 32, or Q. 33, WHICHEVER APPLIES.)

For purchases made through regular retail channels (contrasted with purchases from other individuals not regularly involved in buying and selling), add 3 percent for sales tax if it is not included in the amount paid as given by the respondent.

Q. 24 Comments for Q. 23 apply.

Q. 25 Comments for Q. 23 apply. Complete a page like this for each adult in the household. If possible, obtain the information from each adult. If that is not possible, record the information for each adult as given by the respondent. (BE SURE TO CIRCLE IN THE UPPER RIGHT HAND CORNER WHETHER R OR THE PERSON NAMED SUPPLIED THE INFORMATION.)

Q. 26 Comments for Q. 25 apply.

Q. 27 Comments for Q. 23 apply.

Q. 28 Comments for Q. 23 apply.

Q. 29. CARDS 1 AND 2 SHOULD BE USED TO PROBE FOR EXPENDITURES WHICH MAY HAVE BEEN OVERLOOKED. RECORD EACH PROMPTED RESPONSE ON THE APPROPRIATE PAGE FOR THE INDIVIDUAL INVOLVED (I.E., Q. 23, Q. 24, Q. 25, Q. 26, or Q. 27).

- Q. 30 We are including PAYMENT OF DEBTS as an expenditure. However, balances due on debts are important to know, too, and Q. 30 through Q. 33 are for the purpose of determining what continues to be owed.

FAMILY AS USED HERE REFERS TO ALL MEMBERS OF THE HOUSEHOLD AS LISTED ON PAGE 3.

- Q. 30B BE SURE THAT IF A DEBT IS LISTED HERE, AND IF THE INFORMATION GIVEN ABOUT THE REPAYMENT SCHEDULE SUGGESTS A PAYMENT SHOULD HAVE BEEN MADE IN THE LAST 30 DAYS, TO DETERMINE WHETHER THE PAYMENT WAS MADE PER SCHEDULE AND, IF SO, THAT IT IS RECORDED APPROPRIATELY IN Q. 23 THROUGH Q. 27 AND THAT YOU CROSS REFERENCE EACH (BY LETTER DESIGNATIONS).
- Q. 31A Self explanatory.
- Q. 31B Paying over a period of time refers to using the charge account as a revolving charge (NOT A 30 DAY ACCOUNT WHICH IS PAID IN TOTAL AT THE FIRST BILLING DATE AND ON WHICH NO FINANCE CHARGE IS PAID.)
- Q. 31C Comments for Q. 30B apply.
- Q. 32A Self explanatory.
- Q. 32B Comments for Q. 30B apply. IF THE MONEY IS USED TO BUY A MAJOR APPLIANCE, AUTOMOBILE, TV, OR FURNITURE, CROSS REFERENCE THE RESPONSE WITH Q. 30B. AS WELL AS WITH THE EXPENDITURE ENTRY (Q. 23-27).
- Q. 33A Self explanatory.
- Q. 33B Comments for 30B apply.
- Q. 34A Self explanatory.
- Q. 34B IF PAYMENT WOULD BE INDICATED AS DUE IN THE LAST 30 DAYS, BE SURE TO DETERMINE WHETHER IT ACTUALLY WAS MADE AND, IF SO, RECORD IN THE APPROPRIATE PLACE (Q. 23 THROUGH Q. 27).
- Q. 35A Self explanatory. INCLUDE BURIAL INSURANCE HERE.
- Q. 35B Comments for Q. 34B apply.
- Q. 36A Self explanatory.
- Q. 36B Comments for Q. 34B apply.
- Q. 37A Self explanatory.
- Q. 37B Comments for Q. 34B apply.

- Q. 38A Self explanatory.
- Q. 38B Comments for Q. 34B apply.
- Q. 39 You should write in here the name of the person for whom this set of questions is being asked.
- Q. 40 Be as specific as possible about what the person does (FOR EXAMPLE, IF HE IS A MACHINE OPERATOR INDICATE WHAT KIND OF A MACHINE OPERATOR, ETC.).
- Q. 41-43 Self explanatory
- Q. 44 For each pay day in the last 30 day period, record gross pay, deductions, and take home pay. IF ABSOLUTELY IMPOSSIBLE TO OBTAIN THESE, RECORD TAKE-HOME PAY. INCLUDE AS A DEDUCTION ANY LEIN AGAINST EARNINGS AS A RESULT OF GARNISHMENT ETC. AND INDICATE HOW LONG SUCH A LEIN WILL CONTINUE.
- Q. 45A Self explanatory.
- Q. 45B-D All answers apply to the total for the 30 day period. IF RESPONDENT IS VAGUE ABOUT IRREGULAR EARNINGS, OR IF INFORMATION AVAILABLE ONLY ABOUT THE AMOUNT PER HOUR, ASK NO. OF HOURS WORKED DURING THE LAST 30 DAY PERIOD.
- Q. 46A Self explanatory.
- Q. 46B-D Comments for Q. 40, Q. 41, and Q. 43 apply.
- Q. 47 Comments for Q. 44 apply. ALSO, THIS SECTION WOULD APPLY TO PEOPLE NOT CURRENTLY WORKING FOR PAY BUT WHO WERE EMPLOYED UNTIL SOMETIME IN THE LAST 30 DAY PERIOD.
- Q. 48 Comments for Q. 45 apply.
- Q. 49A Self explanatory.
- Q. 49B WE ARE MOST INTERESTED IN TOTAL TAKE-HOME PAY. HOWEVER, IF R CAN ONLY GIVE HOW MUCH PER HOUR THEY WERE PAID, OBTAIN THEIR BEST ESTIMATE OF HOW MANY HOURS THEY WORKED AT EACH JOB AND WE CAN COMPUTE AN ESTIMATED TOTAL.

- Q. 50 ASK RESPONDENT ABOUT EACH ITEM. RECORD INCOME, IF ANY, FROM EACH SOURCE ONLY IF RECEIVED DURING THE LAST 30 DAYS.
- Q. 51 Record sources such as financial assistance from friends or relatives outside the immediate family, INCOME OF CHILDREN UNDER 16 YEARS (IF THEIR EXPENDITURES RECORDED IN Q. 27 AND Q. 28), etc. If R can state an amount of other income received but is vague about the exact source, record the amount and list the source as best you can determine or list as "uncertain".
- Q. 52A Self explanatory.
- Q. 52B IF ANY REPAYMENTS ON THESE LOANS WERE MADE IN THE LAST 30 DAYS, BE SURE THOSE ARE RECORDED IN THE APPROPRIATE EXPENDITURE RECORD (Q. 23 through 28) AND CROSS REFERENCE BY LETTER DESIGNATIONS.
- Q. 53A Self explanatory.
- Q. 53B Comments for Q. 52B apply.
- Q. 54 Self explanatory.
- Q. 55 Self explanatory.

